

Abstract of the Invention

5 A portfolio-tracking module having a displayable summary interface is provided within a software suite for enabling viewing and manipulation of multiple categories of aggregated data compiled from a plurality of data sources and accessible through a single interfacing node operated on a data-packet-network.. The portfolio-tracking module comprises, an interactive main interface accessible through the summary interface, the main interface for listing stocks and investment accounts for viewing, an interactive menu provided within the main interface for selecting views of individual investment accounts, the views appearing within the same or within a secondary interface, an interactive selection interface provided within the main interface for selecting investment accounts for data tracking, a first interactive hyperlink embedded within the main interface for linking the main interface to a secondary interface for viewing tracked information about personal investments and a second interactive hyperlink embedded within the main interface for linking the main interface to a secondary configuration interface for adding new investment accounts or stocks for tracking. A user working from within the module may interact with selected ones of interactive links for the purpose of invoking a variety of secondary interfaces containing more detailed information about registered investments, financial accounts, and performance data about stocks.

10

15

20